



# Department of Defense Contracting Officers Representative & Tracking Tool Overview

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# Contracting Officers Representatives (CORs)

## Overview



## COR Functions

Assist the contracting officer with requirements definition/acquisition planning & contract formation

Know the terms of the contract

Surveillance of contractor performance and document COR files

Validate invoice – hours worked should equal hours billed

CORs shall not appoint, delegate, re-delegate or sub-delegate COR duties/responsibilities to another person



## Recent COR Policy

### DEPSECDEF Memo of August 22, 2008

- Requires appointment of trained COR before contract award

### USD AT&L memo of March 29, 2010;

- Mandates Training and Certification Standard;
- Ensure CORs have the basic competencies

**\*Draft DoD Instruction being staffed\***

**DoD Contracting Officers Representative Handbook (Under development)**





## Type of CORS

### TYPE A

- **Fixed Price**
- **Low Performance Risk Requirement**
- **Agency experience**
  - 6 -Months General
  - Relevant

### TYPE B

- **Other than fixed price**
- **Low Performance Risk Requirements**
- **Agency experience**
  - 12 Months General
  - Relevant

### TYPE C

- **Unique requirements**
- **Professional license;**
- **Higher education**
- **Specialized Training**
- **Agency experience**
  - 12 Months General
  - Relevant



## Training Requirements

### Type A

- DAU CLC 106- COR with a Mission Focus

### Type B

- DAU COR 222 – Contracting Officer Representative Course, CLC 222 (Online COR Course) or ALU-CL

**DAU CLM 003 – Ethics  
Training**

**Refresher Training,  
Hours specified**

### Contingency

- DAU CLC 206 – COR in a Contingency Environment

### Type C

- DAU COR 222 – Contracting Officer Representative, CLC 222 (Online COR Course) or ALU-CL



# Contracting Officers Representative Tracking Tool (CORT Tool)

## Overview



## COR Tool Background

**PROBLEM:** Section 813, Panel on Contracting Integrity, mandated by Congress in the NDAA 2007, required DoD to examine efforts to eliminate areas of vulnerability. Panel identified as a major vulnerabilities

- Lack of training and appointment/designation of Contracting Officer Representatives (CORs);
- Inadequate oversight of contractor performance by CORs
- Insufficient surveillance on contracts

**SOLUTION:** Revise policy, procedures and training for CORs and build a COR Tracking, Maintenance, & Reporting tool

- Develop a DoD COR certification standard; define minimum COR competencies, experience and training requirements - (Panel Solution)
- Army development of a COR Tracking Tool - (Army Solution)
  - Part of existing Army Virtual Contracting Enterprise (VCE) suite
  - Adapted for DoD enterprise use (CORT TOOL) - (DoD Solution)





## Army VCE COR Tool

Developed in 2008 at ACC Fort Monmouth, NJ to address short falls in their COR Program, initial go live was June 2008

Current user base; over 2,200 CORs registered and over 3,000 active appointments

Integrated with DPAP COR Tool for oversight and accessibility

Army-Wide release to be complete by 31 Mar 11

Various Army IGs comment the site will greatly improve oversight and accountability of Army CORs

Automatically passes all COR files to the Army's digital contract repository, Paperless Contract Files (VCE-PCF) eliminating document management responsibility for contracting specialists



## DoD CORT Tool

**DoD Solution: Joint “Purple” version of the Army Tool -“Department of Defense Contracting Officer Representative Tracking Tool (CORT Tool).**

**A web-based application designed to track, approve COR candidates, existing CORs and COR related documents;**

- Allows the nomination, appointment, revocation and termination of an individual as a COR against a DoD contract or a contract or order issued on behalf of a DoD assisting agency.
- Allows a COR to create a profile, document their training and experience and process a nomination package for one or multiple contracts and orders.
- Provides DoD personnel a web-based portal for all relevant COR documents
- Requires the creation of Army or Defense Knowledge Online (AKO/DKO) Account



## Benefits and Impacts

### Organization of a centralized repository of COR information

- Provides DoD with one source for all information on CORS (Name, career field certification level, etc.)
- Ability to identify the number of CORs within DoD

### Electronic nomination workflow process

- COR has the ability to self nominate;
- Electronic supervisor and contracting officer/specialist approval of COR nomination request
- Review the status of a COR nomination
- Add and review COR documents, such as a Status Report, COR trip report, correspondences and other miscellaneous documents to one or more of the COR appointed contracts

### Ensures trained CORs are assigned to appropriate contracts / based upon complexity of the work/requirement (Type A/B/C)

### Management Reports (Under development)





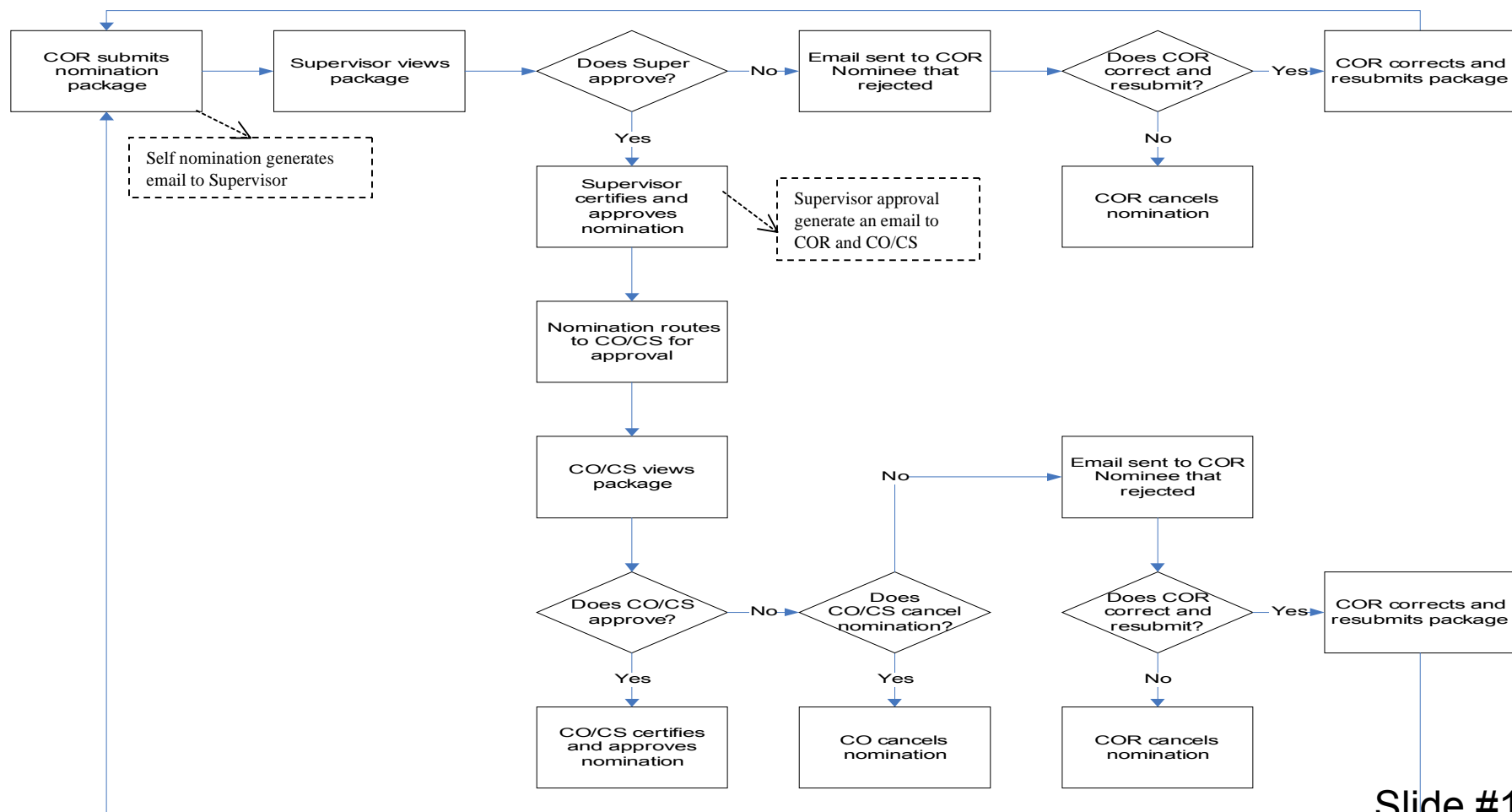
## Roles

- **CORs or COR Nominee**
  - Create or update a COR Profile
  - Self nominate as a COR on a contract or order
  - Review the status of a COR Nomination
  - Upload COR documents for a specific contract or order
- **COR Supervisor**
  - Review a COR Nomination
  - Approve or Reject a COR Nomination
  - Review COR reports /documents for a specific contract or order
- **Contracting Officer/Contract Specialist\* (*Per agency policy*)**
  - Create a Letter of Designation
  - Approve or Reject a COR Nomination – after Supervisor Approval
  - Review COR reports/documents on a specific contract or order
  - Access and upload COR reports/documents on a specific contract or order
- **Subject Matter Expert (Department Level)**
  - Agency deployment
  - Create a COR Profile (ADMIN)
  - COR Proxy (ADMIN) - *Troubleshooting*
  - View CORs (ADMIN)
  - Management Reports (Under development)





## Nomination Process





## Upcoming Policy

### USD AT&L memo (staffing completed; departmental support)

- **Announces and designates DOD COR Tracking (CORT) Tool as an enterprise capability**
- Ensures regular communications between CORS and Contracting Officers
- Ensures adequate number of appropriately trained COR are identified and available for present and future contingencies
- **Requires each department/agency to develop a deployment plan**
  - Appointment of a Component Subject Matter Expert
  - Develop a plan to deploy across agency

### \*Draft DoD Instruction (DOD I) being staffed\*

- **Mandates enterprise use of the CORT Tool**



## \*DoD Phased Deployment

### Phase I - 2<sup>nd</sup> QFY11

- Department of the Navy – NAVSEA, NAVSUP, NAVAIR and SSP
- Department of the Air Force – Gunter and Wright Patterson
- Defense Logistics Agency (DLA)
- Missile Defense Agency (MDA)
- Defense Information System Agency (DISA)

### Phase II – 4<sup>th</sup> QFY11

- Department of the Army –ACC will use the Army version of CORT Tool.
- Department of the Army – All other Army contracting organizations will use the DoD CORT Tool
- Continue deployment at all remaining site for pilot agencies / defense agencies

### Phase III - FY12

- Remaining DoD agencies



## Resources

CORT Tool Website: <https://arc.army.mil/DoDCOR>

DoD POC – Mae Bartley – [mae.bartley@osd.mil](mailto:mae.bartley@osd.mil)

Component Subject Matter Expert - \_\_\_\_\_

Training Materials will be available at <http://www.acq.osd.mil/dpap/pdi/eb>

- CORT Tool Training Presentations
- CORT Tool User Guide
- Frequently Asked Questions (FAQs)
- Deployment Plan Attachment

CORT Tool helpdesk contacts - [cort@osd.mil](mailto:cort@osd.mil)





## Next Steps

CORT Tool Demo – available at the conference

- Presented by Mike Neeb & Dana Chan
- Check demo schedule

CORT Tool training is being scheduled by DPAP

- Check with Agency/Component Subject Matter

Conference presentations will be posted at the conference web-site

Signed deployment memorandum



# Defense Procurement eBusiness Conference

**eBusiness**  
Defense Procurement  
and Acquisition Policy

HILTON ORLANDO  
ORLANDO, FL  
**MARCH 1-3,**  
**2011**





## Points of Contract

- **DoD Policy - Peggy Ayanian**
  - [Peggy.ayanian@osd.mil](mailto:Peggy.ayanian@osd.mil)
- **Army VCE - Mike Thompson**
  - [Mike.thompson@us.army.mil](mailto:Mike.thompson@us.army.mil)
- **CORT Tool - Mae Bartley**
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